



Flanders
State of the Art



BEAUTY PRODUCTS IN SWEDEN

FLANDERS INVESTMENT & TRADE MARKET SURVEY

April 2020

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Beauty products and the according beauty sector is one of the big players in the Swedish consumer market. As a country that places big emphasis on the health aspect in different parts of life, food consumption, beauty, work and others, it does the same with the products regarding the beauty sector. This has a big impact on the marketing of these products, which will also be tackled in this report.

“Any substance or mixture intended to be placed in contact with the various external parts of the human body (epidermis, hair system, nails, lips and external genital organs) or with the teeth and the mucous membranes of the oral cavity with a view exclusively or mainly to cleaning them, perfuming them, changing their appearance and/or correcting body odors and/or protecting them or keeping them in good condition” (CTPA, 2020).

- Clean
- Perfume
- Change appearance
- Correct body odor
- Protect
- Keep in good condition.

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- Epidermis
- hair system
- nails
- lips
- external genital organs
- teeth
- mucous membrane of the oral cavity

A last determining factor within the definition of a cosmetic product is composition. It needs to conform with the EU cosmetic regulations. If the composition of the product is not according the following regulations it cannot be marketed as a cosmetic, despite claims made.

- ingredients which are prohibited in cosmetic products.
- ingredients which are restricted in cosmetic products.
- preservatives, UV filters and colorants which are permitted in cosmetic products (preservatives, UV filters and colorants not listed in the Schedules to the Regulations are not permitted in cosmetic products).

3. BEAUTY MARKET IN SWEDEN

The total revenue in the Beauty & Personal Care market amounts to US\$2,110m in 2020. Predictions regarding the market are optimistic. It is expected to grow annually by 2.2% between 2020 and 2023. Also visible in figure 1 is that the category cosmetics and skincare are the ones expected to add the most revenue to the overall market in a prediction until 2023.

In relation to total population figures, per person revenues of US\$08.94 are generated in 2020. In global comparison, most revenue is generated in the United States with a revenue of US\$84,970m in 2020. The top five markets according to revenue are the US, China, Japan, India and Brazil. Sweden lists as 41st country. The market's largest segment within the Beauty & Personal Care market is the segment Personal Care with a market volume of US\$856m in 2020. (Statista, 2020)

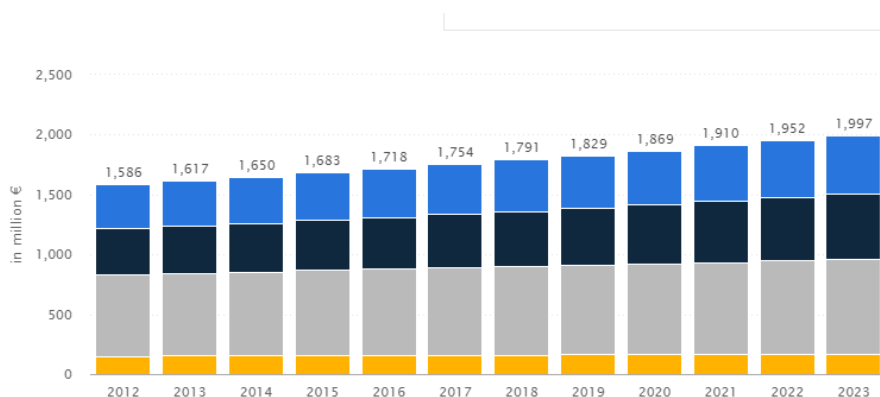
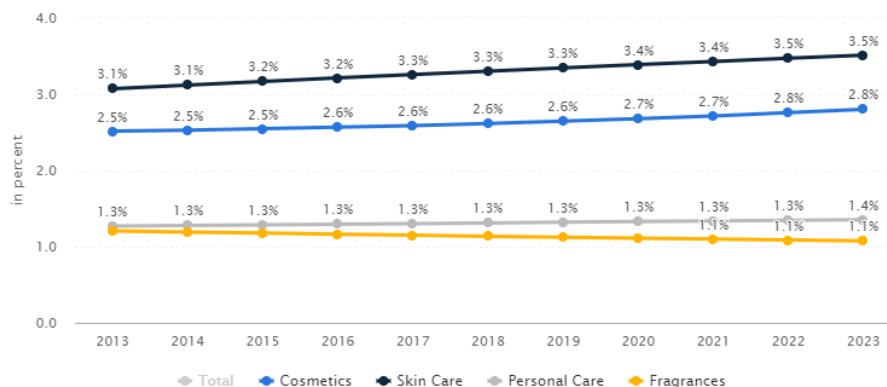


Figure 1 Revenue in the Beauty and Personal Care market



3.1 TRENDS IN THE BEAUTY AND COSMETICS MARKET

Scandinavian beauty is becoming more and more popular in contrast to the heavy beauty routines previously popular, such as the Korean beauty routine. The ethos in Scandinavian beauty routines is simplicity, practicality and function. Minimizing beauty routines and other aspects of life considering sustainability and ecological footprint is something more and more consumers are wanting to do, and the Scandinavian philosophy supports that.

In 2017, research of Mintel Beauty and Personal care trend brought to light several aspects of Scandinavian life and showed its introduction in the beauty world. Back to basics and the hygge trend from Denmark pushed consumers to rethink their complicated routines and get back to a simpler life as well as minimize stress factors.

Followed up by the Hygge trend was the Swedish replacement of Lagom, which translates to “not too much, not too little”. This word pushed forward a trend of living a balanced and proportioned life as well as bringing simplicity into several routines. This translates into all aspects of the beauty world and its products. In skincare and cosmetics, this trend is visible in all aspects of product development, from packaging and logo to formulation. This means that the packaging of a product tends to be straightforward and simple, with clean lines and neutral, soothing colors that will appeal to minimalist consumers. Regarding formulation this means that the product cannot contain extra ingredients, like artificial fragrances and parabens.



In Sweden specifically, a trend of expansion of private labels by pharmacies and beauty retailers is prevalent right now. In the last few years, retailers such as H&M and their & Other Stories apparel have built up a considerable share of beauty lines and products. In 2015, H&M aggressively expanded its own private label, launching more than 1000 new beauty products. Other apparel retailers have added to the trend by following H&M in their addition having a considerable share of beauty products of their own. The reason

Private label products still have the competition of external brands as none of the retailers solely sell their own products. These low-price generated products are therefore gaining sales every year as they belong to the low-priced segment. H&M for example continued to increase its portfolio, moving into new categories and selling products in the H&M conscious line focusing on ecological beauty.

3.2 TOP BEAUTY BRANDS IN SWEDEN

	Turnover in million SEK
H&M Hennes & Mauritz Sverige AB	6,690
Lindex Sverige AB	3,302
Unilever Sverige AB	3,284
Runsven Aktienbolag	2,535
Kicks Kosmetikkedjan AB	2,195
L'Oreal Sverige AB	1,732
Foreo AB	1,591
Orkla Care AB	1,302
Henkel Norden Aktiebolag	1,285

Below are some of the most popular but relatively smaller beauty brands in Sweden (McMeekin, 2018).

1. Idun

This Swedish beauty brand was founded in 2011 and is a makeup line based on highly purified minerals. Product development is done in consultation with dermatologists and Swedish researchers, which means their products for face, eyes, lips and nails suit is adapted to all different sorts of skin. Available only in Swedish pharmacies. (Idun, 2020).



<https://idunminerals.com/>

2. Verso

Verso was launched in 2013 and has the goal of being a utility-minded contribution to skincare, committed to providing essential products that effectively target the skin's daily needs. With science as a starting point, Verso aims to make high-quality products with a low ingredient count (Verso Skin, 2020).



https://versoskincare.eu/?__store=verso

3. FACE Stockholm

Founded by Gun Nowak in the early '80s, FACE was the idea of Gun Nowak because of not finding the right makeup for herself. In 1982, she opened the first FACE Stockholm shop and it was immediately a roaring success. The FACE Stockholm of today has evolved with the times and has a global following (FACE Stockholm, 2020).



<https://facestockholm.com/>

4. & Other Stories

The brand is known for being the posh, big sister of H&M, but now the makeup line is garnering attention and a growing number of fans. This is due to not just affordability but also because the makeup compliments the fashionable items on the racks. They offer the full range of lip, brow, eye, and nail products, and the line is updated regularly (& Other Stories, 2020).



https://www.stories.com/en_eur/index.html

5. SACHAJUAN

SACHAJUAN is a brand driven by the beauty of simplicity. The company has a mission in making haircare less complex range, they wanted to make things easier for stylists and clients. The name originates from our founders Sacha Mitic and Juan Rosenlind who combined their names to form SACHAJUAN when they started their Stockholm salon in 1997.



<https://sachajuan.com/>

6. Isadora

The brand originated in the '80s and has grown to become the go-to affordable makeup brand that puts the emphasis on quality products that are 100% mineral. This brand is often the first one younger consumers try. The company prides itself in their elegant packaging, non-perfumed products, and extensive range of choice (Isadora , 2020).

<https://www.isadora.com/>

ISADORA

3.3 DIFFERENCES WITH BELGIUM

1 Product Aesthetics

A difference with Belgium is the look and feel of the product and by extension the brand. In Sweden a brand is born from a specific concept and story such as the history of the brand or the 'lagom' concept. This is in Belgium not the case. A consequence of this is that this seeps through in the way branding and marketing is done as in Belgium the marketing is focused on the result of the product whether in Scandinavian countries, the concept of simplicity and transparency is used to advertise as well as the connection to the audience through the use of influencers matching the look of the product. The difference can be seen below. Sweden uses simplicity and calmness as a selling point in for example packaging



2 Branding and marketing

A difference in branding and marketing is definitely noticeable. In Belgium, a story surrounding a product is barely used to market it to a specific audience. There are some big brands such as Maybelline and Essence that target towards a younger audience, and there are the bigger brands such as Chanel and Dior for a more mature audience. But these big brands barely need any advertising. This is not the case in Sweden, because of the diversification in cosmetic brands, there is more marketing present. This is often done through the use of influencers and models and need to fit with the specific brand of the product. An example of branding through the use of influencers is former miss Sweden Emma Strandberg, who has a website and often is seen promoting different cosmetic products.

Example of Swedish Cosmetics Website: <https://lowengrip.com/>

3 Emphasis on simplicity of ingredients

A third difference in the cosmetic market in Belgium versus Sweden is the emphasis on the simplicity of the ingredients in Swedish cosmetic products. This is not the case in Belgium. The emphasis on active ingredients and using these as a unique selling point is typically Scandinavian, it sends the consumer a clear message of the purpose of the product and will simply tell what the product is good for. For example, the name of a product of Verso is the active ingredient, either being retinol or vitamin A.

3.4 THE SWEDISH COSMETICS, TOILETRIES AND DETERGENTS ASSOCIATION (KOHF)

The Swedish Cosmetics, Toiletries and Detergents Association is a trade association of companies that import, manufacture or market cosmetics (incl products for professional use) and detergents. The organization has regular contact with national authorities such as the National Chemicals Agency (Kemikalieinspektionen), Environmental Protection Agency (Naturvårdsverket), Work Environment Authority (Arbetsmiljöverket) and Medical Products Agency (Läkemedelsverket, Cosmetics) (KOHF, 2019).

The goals of the organization can be defined as the following:

1. *To promote the cosmetics and detergents industries and broadening the knowledge of the industries and their products.*
2. *To capture, channel and pursue issues of common interest to member companies versus government agencies, departments, groups of customers, consumers, other organizations etc.*
3. *To be one step ahead concerning health and environmental issues.*
4. *To promote international cooperation and harmonization of Swedish legislations with EU directives and regulations.* (KOHF, 2019)

Contact info

Visiting address: Storgatan 19, Confederation House, Stockholm

Post address: Box 5501, 114 85 Stockholm

Staff

Everyone can reach staff shown on the contact page by the following e-mail address:

first_name.surname@ktf.se. (<https://www.kohf.se/om-ktf/kontakt>)

info@ktf.se is also available

CEO Olof Holmer

General responsibility for the company and the board of directors of KoHF. Also works operationally with various projects.

T 070-950 70 19

E olof.holmer@ktf.se

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Next to the different goals previously mentions, KOHF offers a fact data bank offering an alphabetical list of regulations according to products and chemicals allowed in cosmetics in Sweden. The organization offers training and seminars regarding the industry, accessible after registering through the website. This can be done through the following link: <https://www.ktfutbildning.se/>

A company can also become a member of the organization by contacting the organization or the following people.

Olof Holmer, Managing Director

Peter Jansson, Cosmetic products

Anna Melvås, Detergents and Cleaning products

Anneli Håkansson, Swedish Beauty & Cosmetics Awards and Look Good Feel Better

4. BRANDING

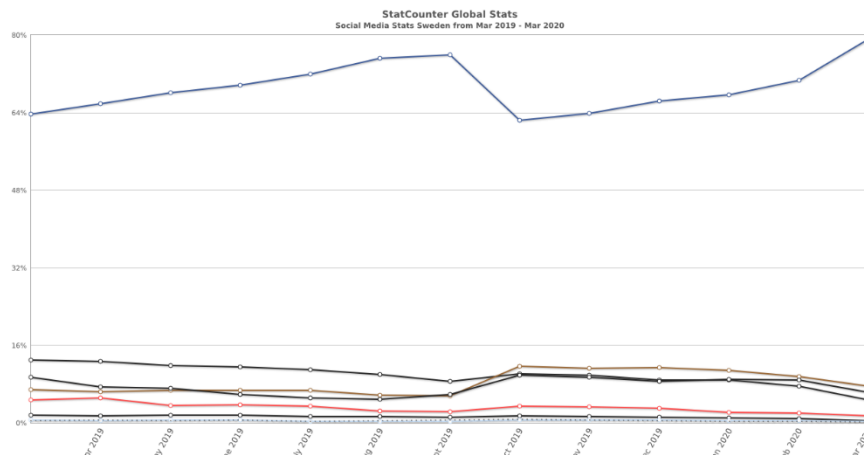
Sweden is categorized as a consumer society. Price is considered the main factor for purchasing the product, followed by quality by a close second place. Other important factors are the seller's know-how as well as the after-sale service. In Sweden, 53% of Swedish consumers research a product online before going to a store, 13% inquire in-store before making a purchase. The choice of payment methods is also an important factor. 50% to 75% of purchases will be made on the internet.

Consumer confidence has been dropping since the end of 2017, falling below the average for OECD countries. Although consumers are relatively open to international brands, Sweden's favorite brands are national. In the top 10 favorite brands, only 2 international brands appear (Apple and Google in 9 and 10th position) (Satander Trade Markets , 2020).

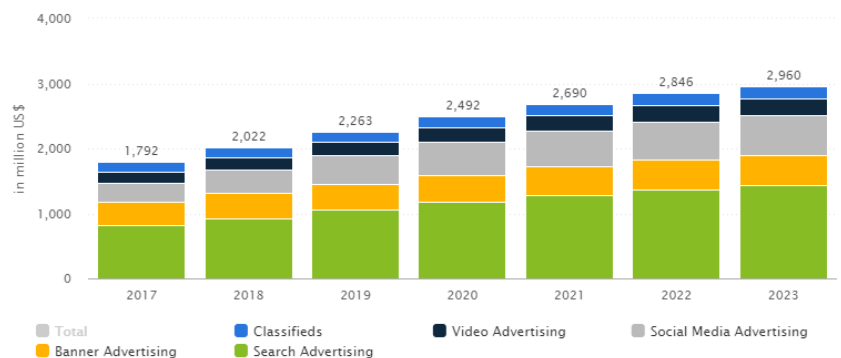
In 2017, Swedish consumers were measured to be increasingly less loyal to brands with 77% of loyalty programs failing within 2 years. A program does not define or lock the loyalty of a person.

What is important to note is that the penetration rate of social networks in Sweden was 72% in 2017 and has increased to almost 80 % today, and 58 % of Swedes use them every day in 2017. The most used social media channels in Sweden are Facebook, Twitter and Instagram, with Facebook having a considerable lead.

Among the ways to make buying decisions, following influencers is the most important.



Ad spending for online advertising had increased in the last few years and has been predicted to continue rising throughout the coming years. In 2020, online ad spending in the digital advertising market is expected to amount to US\$ 2,492 million. Important to note is that mostly search advertising as well as social media advertising are expected to become more and more important. Social media advertising has risen



from US\$ 293 million in 2017 to US\$ 499,6 million in 2020 and is even expected to rise to US\$ 252,6 million in 2023. The same rise goes for search advertising with a spending of US\$ 817 million in 2017 to US\$ 1.174, 1 million and an expected expenditure of US\$ 1.443,3 million in 2023. (Statista, 2020)

Advertising and the spending according to Statista Sweden is more effective on mobile applications such as social media. Because of the applications on mobile phone, they have become more significant. Below, you can find the split between desktop and mobile advertising spending. The prognoses for 2023 will be that 31 % of total ad spending in Sweden will be generated through mobile.

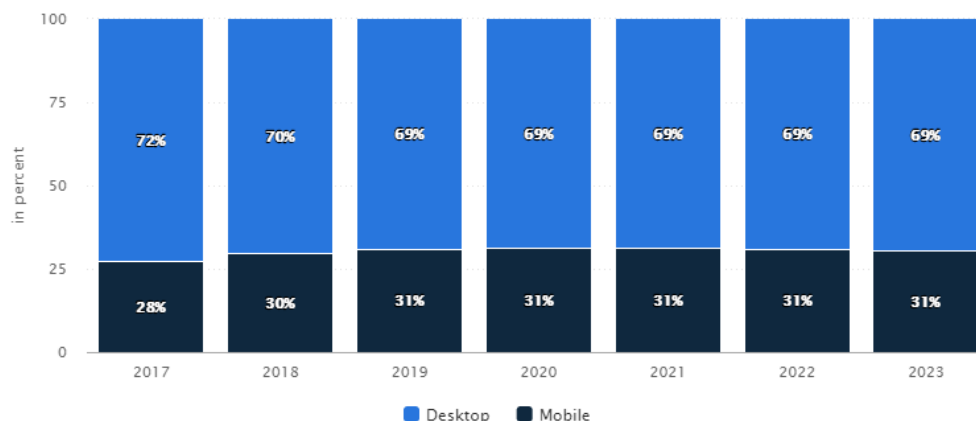


Figure 6 Split between desk and mobile

4.1 ONLINE BRANDING

The most prominent part of the promotion and branding Scandinavian beauty products is the “Scandinavian aesthetic”. Aesthetic can be defined as having a sense of the beautiful; characterized by a love of beauty. Part of the Scandinavian branding is that the products fit in perfectly with the minimalist lifestyle movement that has been trending in the last few years in both the fashion and beauty community.

Online branding is becoming more and more important in the current beauty industry in Sweden. In the beauty & personal care market, 50 % of total revenue will be generated through online sales by 2023. The evolution has been apparent. With an online-sales share of 38 % in 2017 to 45 % in 2020, it shows a steady increase due to the rise in popularity of online shopping as well as social media usage. Online sales are only expected to increase even more soon.

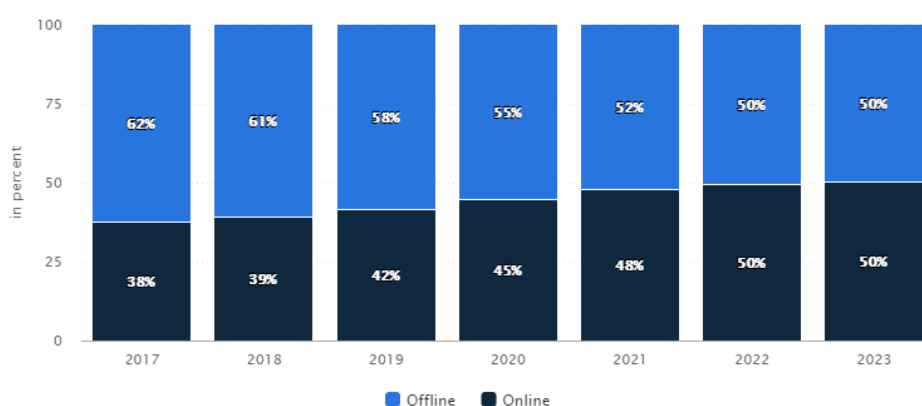


Figure 7 Sales channels in percent

According to KoHF, links to bloggers and opinion leaders are coming more and more to the forefront. On top of this, social collaborations are becoming more important too. To keep in mind however is that third party communication has attracted attention to confuse readers with what advertising is and what PR is. Recently, the consumers' ombudsmen in the Scandinavian countries have agreed to coordinate their efforts against hidden advertising on social media. The Swedish Commission for Advertising Media for Public Relations has developed guidelines in this aspect and makes recommendations on how companies should relate to opinion formers on social media – regardless of the channel.

The aim of the recommendations is to disseminate knowledge about the regulations applicable to companies and advertisers working with publicity and marketing in social media and to promote good and ethical cooperation between advertisers and opinion leaders.

The recommendation is that companies working with PR and communicating through third parties have to work together with opinion leaders in social media, as they do in traditional media. They stress that many bloggers and other opinion makers on social media are young and do not have the same level of education as reporters, thus businesses have a special duty to ensure that marketing communications do not violate the Marketing Act or the rules of the International Chamber of Commerce (ICC) for advertising and marketing communications.

“Young bloggers and opinion makers are often unfamiliar with normative or market rules. It is therefore up to the advertiser to ensure that the blogger is also aware of the rules that apply to paid partnerships. If the blogger is incapacitated for work, we recommend contacting the administrators.”

Maria Mossenberg, head of communications at L'Communicationsreal and chairman of the Swedish advertiser's public relations committee.

The recommendations made by KoFH also indicate the importance of advertising. If an advertiser is part of a collaboration with an opinion leader, the collaboration must be advertised with a text that directly indicates that it is a collaboration and who the advertiser is.

"It is possible to participate in this form of advertising, but it is the advertiser's responsibility to advertise the posting if it is a paid collaboration, so that the reader can form their own idea of a product or service. Nobody benefits from minimizing the credibility of blogs and other social channels, and there is also a risk that it looks back on the advertiser's brand."

Maria Mossenberg.

Below, a chart including the top Swedish Instagram influencers can be found. The majority of these influencers are categorized as lifestyle, beauty and health influencers, all accepting sponsorships and advertising offers.

[illegible]

Top Sverige 2019	Nickname	Followers Dec 2019	Engagement	The average amount of comments	Growth per day
Anna Nyström	annanystrom	8,4M	2,90%	1711	1800
Rachel Bräthen	yoga_girl	2,1M	1,40%	295	45
Linn Löwes	linnlöwes	2,1M	3,80%	773	1400
Kenza Zouiten	kenzas	1,9M	4,70%	185	63
Clara Lindblom	clara_lindblom	1,97M	4,90%	931	1800
Hanna Öberg	hannaöberg	1,74M	2,50%	270	1600
Janni Delér	jannid	1,4M	13,50%	1423	559
Christoffer Collin	wisslaren	1,2M	2,20%	159	-97
Bianca Ingrosso	biancaingrossa	1,1M	5,50%	316	211

Figure 8 top 10 Instagram influencers Sweden

Important to note is that the trends currently going on in the beauty industry in Sweden are also reflected in the branding online. Websites are often white and clean, representing a minimalistic aesthetic appealing to the simpler and balanced lifestyle many Swedes, and other nationalities strive for.



5. MOST IMPORTANT EVENTS AND MAGAZINES

5.1 TRADE FAIRS

Note that Covid-19 restrictions may apply. Stay updated.

International Conference on Dermatology and Cosmetology

International conference provides a platform for researchers and decision makers to present their research work and learn about all the important advancements in the field of dermatology. A second focus is cosmetology. <https://10times.com/cosmetology-and-dermatology-abu-dhabi>

Date: to be determined

Place: Stockholm

Delegates: 500-1000

Skin & Cosmetics

The fair is a significant meeting place in the skincare industry and the only trade fair in Sweden that directly addresses people who work in the skincare and beauty industry.

<https://10times.com/skin-cosmetics>

Exhibitors: 500 +

Exhibitors: 500

Place: Stockholm, Sweden

<http://www.nordicstylemag.com/beauty/>

<https://www.amelia.se/>

[illegible]

Elle Sweden

Available online and in paper.

Focus on fashion, beauty, decorations and blogs.

Good representation of the typical Swedish look and brands.

Contact : <https://www.elle.se/kontakt/>

T 08-57 80 10 00 | E ellered@elle.se

Post address: ELLE, Box 27 700, 115 91 Stockholm

Visiting address: Humlegårdsgatan 6, 114 46 Stockholm

<https://www.elle.se/>

Damernas Värld

One of the oldest Swedish magazines.

Focus on fashion and beauty and Swedish brands.

They have a separate page linking all their bloggers.

Contact: redaktionen@dv.bonnier.se

<https://www.damernasvarld.se/>

Femina

Traditional Swedish magazine.

Focus on fashion and beauty (Swedish and international brands).

Contact: <https://www.femina.se/nyhetsbrev/>

<https://www.femina.se/>

5.3 BEAUTY PRODUCT DISTRIBUTORS

Dermarome Stockholm Aktiebolag

www.dermarome.se

info@dermarome.se

T +46-8-53480080

Stockholm

CEO: Lars Borgmalm

DMK Sverige AB

www.dmk sverige.se

info@dmksverige.se

T +46 42-260100

Råå

CEO: Mette Rångved

Ellancé Aktiebolag

www.ellance.se

info@ellance.se

T +46-8-54568850

Stockholm

CEO: Grynet Geldern

The Hair&Body Company in Sweden AB

www.hair-body.se

info@hair-body.se

T +46-73-9805778

Stockholm

CEO: Bo Melin

6.2.1 Marketing & Branding

The content of marketing regarding cosmetic products is regulated by several actions and guidelines of the European Union, the most important ones, according to KOHF, are listed below:

EU Regulation 1223/2009 on cosmetic products (Article 20).

This is the main regulatory framework for cosmetic products within the EU, which also provides the basis for claims and directives on claims. Concepts are defined here, and a general definition of cosmetics is given according to the European Commission.

EU Regulation 655/2013 on common criteria for claims made on cosmetic products and referring to them.

The purpose of this document is to protect the end users of cosmetic products against misleading claims by providing clear criteria for both companies and authorities. They apply to statements printed on the packaging regardless of the media or the type of marketing tools. These criteria should be used once it has been established that a product is a cosmetic product.

The six common criteria are presented in the Regulation with short explanatory texts.

Technical document.

A replacement technical document on claims made about cosmetic products.

Responsible advertising and market communication of cosmetic products

The advertising ombudsman, an assessment body with an indicative role in advertising, adopted the European industry document (in Sweden through KOHF) on responsible advertising and marketing communication for cosmetic products.

KOHF's Responsible Marketing document is a translation of the document prepared by the European cosmetics organization Cosmetics Europe. These documents are available in Swedish and English.

Other recommendations of the European Commission: information on animal experiments, protection from the sun.

This document is concerned with marketing communication on animal testing. It also contains the Recommendation of the European Commission in marketing communication on the guarantee that no animal testing has been carried out. The marketing of cosmetic products which are sunscreen products should consider the recommendations of the European Commission on market communication on labelling and claims made on sunscreen products.

6.2.2 Advertising language

The issue of language requirements for cosmetics labelling is a concern for many companies, especially from abroad. There are several examples of how municipal inspectors have been remarkably strict in their supervision of product labelling.

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“The text of the rules can be found in Article 19 of Regulation (EC) 1223/2009, § 4 of Regulation 2013: 413 and § 2 of the rules of the Swedish Medicines Agency (LVFS 2013: 10). In addition, there are rules on the marketing of cosmetic products in Article 20 of Regulation (EC) 1223/2009 and in Regulation (EU) 655/2013.”

The previous regulations state that certain texts concerning the product must be written in Swedish when a cosmetic product is made available to the end user on the Swedish market. This applies, inter alia, to the amount of content, the best-before date, special precautions to be observed in use and the effect of the cosmetic product, the so-called product name (Jansson, Language Requirements, 2020).

The Glossary of the Swedish Academy (SAOL) explains which words in the cosmetics and marketing sector are considered Swedish or not. However, in the case of cosmetic product names, it is not appropriate to apply this definition. Table 1 below lists three product names found in SAOL and thus, by definition, part of the Swedish written language. This means that the words 'After Shave', 'Eau de Cologne' and 'Rouge', for example, are Swedish. These words can be used in English because they are accepted by the list but other terms such as 'conditioner', 'bodylotion' and 'foundation' cannot be used in English and are obligated to be used in their Swedish translation (Jansson, Language Requirements, 2020).

However, a basic rule for cosmetic products is that they must be safe for human health under normal and reasonably foreseeable use. KOHF has identified five product types that are of particular importance when it comes to product labelling and understanding the function of the cosmetic product. Abuse in these product groups can lead to an undesirable or serious undesirable effect. Therefore, labelling of these products should contain clear information on the function, instructions to the user and precautions to be observed during use. These markings must also be in Swedish (Jansson, Language Requirements, 2020).

1. Aerosols
2. Hair
3. Dental and oral products
4. Sun Care
5. Gel varnish (and other hardening products)

Contact

Any questions regarding regulation on cosmetics in Sweden and by extension Europe can be asked to the organization.

Peter Jansson
Cosmetische producten, regelgeving
070-825 08 48
peter.jansson@ktf.se

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7. EXPANDING TO SWEDEN

Sweden is a welcoming country for foreign investors wanting to export to - or collaborate with Sweden. Information is readily available, and companies already established are transparent and open. Information on both the market as well as the government procedures is often available in both Swedish and English. Often business procedures are smooth and efficient. Local advisors and business partners are often the most prized aspect of starting up a business or collaboration in Sweden. Swedish companies are often very open to partnerships. But important to keep in mind is that competition in the beauty sector may be fierce. With most of the population, being 85 %, living in the southern part of the country, it is wise to establish yourself in that area. Stockholm, Gothenburg, Malmö or Uppsala are the four major cities. On top of this, Sweden, with its geographical location is a great place to start expanding to the greater Scandinavian region.



Figure 9: globalization

With a well-established distribution network, the Norwegian, Danish and Finnish markets are easily available.

Collaborations, trade or expansion of your company within the EU are facilitated.

7.1 RELAXED ATMOSPHERE

Doing business in Sweden can be challenging regarding the understanding of a new culture. The business culture may seem similar, despite this, the Swedish way of working is different from other countries in the EU. Communication in a business environment is relaxed and more on the casual side. After meeting for the first time, people often address each other by their first name in written as well as spoken word. The more relaxed atmosphere also translates into a horizontal working environment. This means that a shorter chain of command is present, and that transparency is important for the higher executives. Hierarchy is not present in the company and titles or statuses are just that. That way, it is easy to reach an executive or CEO. Furthermore, relaxed but conservative clothing often is accepted in the office, but dressing up for a meeting always shows for an appreciation or sign of respect (Sweden, 2020).

7.2 LAGOM

Lagom is a concept not used in the Belgian way of doing business. It cannot be translated but is often described as “not too much or too little”, it means adequate. The concept is used in the Swedish society for just about anything, including the beauty brands mentioned above. It describes the need to do just the right amount of work for a specific task. This concept is not just applied in business, but in other areas of life as well such as health and beauty (Sweden, 2020).

8. RELEVANT SOURCES

8.1 SOME RELEVANT WEBSITES

KOHF	https://www.kohf.se/
Example of influencer	www.lowengrip.com
Example of influencer	www.emmmas.com
Eu cosmetics legislation	https://ec.europa.eu/growth/sectors/cosmetics/legislation_en

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Figure 1 Revenue in the Beauty and Personal Care market	4
Figure 2 Revenue growth in the Beauty and Personal Care market.....	5
Figure 3 Top 10 brands on turnover for beauty.....	6
Figure 4 Most used social media channels in Sweden.....	11
Figure 5 Online ad spending in Sweden	11
Figure 6 Split between desk and mobile.....	12
Figure 7 Sales channels in percent.....	12
Figure 8 top 10 Instagram influencers Sweden	14
Figure 9: globalization	20
Figure 8: Fika break-image bank from Sweden.....	21